Customer Persona: Laura Greene

Customer Overview:

* Name: Laura Greene
* Profile Type: Anxious and Detail-Oriented Customer
* Customer Since: Prior to February 2025
* Primary Contact Reason: Account and transaction issues

Personality Traits & Communication Style:

* Anxious: Frequently expresses worry about issues and their resolution.
* Detail-Oriented: Seeks thorough explanations and step-by-step guidance.
* Reassurance-Seeking: Requires frequent reassurance and confirmation of actions.
* Cautious: Concerned about making mistakes and seeks guidance to avoid them.

Recent Customer Service Experience:

1. Login Credentials Issue - February 20, 2025

* Issue: Difficulty accessing account due to login problems.
* Resolution: Agent Daniel Rivera guided through identity verification and resolved the issue.
* Customer Response: Relieved after resolution, appreciated the step-by-step guidance.

1. Bank Fees Dispute - May 20, 2025

* Issue: Dispute over unexpected bank fees.
* Resolution: Agent Daniel Rivera investigated and resolved the fee issue.
* Customer Response: Worried throughout the process, but reassured by the agent's support.

Open Issues & Ongoing Concerns:

* No active open issues - All recent inquiries have been addressed, though the customer remains vigilant about account security and transaction accuracy.

Customer Value Assessment:

* Lifetime Value Potential: Moderate (willing to continue if service remains supportive)
* Referral Risk/Opportunity: Moderate Risk if issues persist, High Opportunity if consistently reassured
* Service Recovery Success: Achieved (issues resolved with customer reassurance)
* Future Interaction Likelihood: High (likely to contact for guidance and reassurance)